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Report Highlights:

In Accra, Ghana, November 4-6, agricultural officials from 16 CILSS (Inter State Committee for Drought Control in the Sahel) and ECOWAS countries gathered to present and validate the regional 2008/09 agricultural campaign figures ex-post as well as to present the 2009/10 Cereal and Food Balance Sheet. Despite two relatively good agricultural campaigns across the region since the start of the food-price inflation crisis began in late 2007, prices across the region remain well above historical averages – and most observers expect them to stay high. Cereal production in Chad and Niger is expected to decline significantly year to year due to poor seasonal rains.

General Information:

In Accra, Ghana, November 4-6, agricultural officials from 16 CILSS¹ and ECOWAS² countries gathered to present and validate the regional 2008/09 agricultural campaign figures ex-post as well as to present the 2009/10 Cereal and Food Balance Sheet. Prior to this meeting, a joint evaluation mission was completed in partnership with FAO, FEWSNET, WFP, CILSS and local government representatives in 17 countries to support them on the data collection and validation and also assess the regional food security situation. Several organizations as FAO, FEWS NET³, JICA⁴, USAID/OFDA⁵, USAID/WA⁶, USDA/FAS, and CILSS were represented. Mali did not participate in the meeting.

Participants confirmed that the rainy season started relatively late in July and was regular and very intense in August involving floods that resulted in serious damages and deaths - especially in Burkina Faso. In some areas across the Sahel, the rainy season ended abruptly in September. There are also deficit areas that have resulted in poor pastoral development. The pastoral situation is critical in the northern Sahel region which includes Chad, Niger, north-eastern Burkina Faso, north-eastern Mali, and the central-north of Mauritania. In these areas water levels remain low and the grassy vegetation cover is rated as poor. As a consequence, early migrations of people and animals have already been observed. Despite relatively stable regional cereal production, these regions will face food insecurity due to isolated areas of deficit food crop production, lack of animal feed resulting in a declining resource base, and overall poor distribution and access to food.

With regards to crop protection, significant damages to crops have been observed due to attacks of aphids, caterpillars, birds, grasshoppers and millipedes. Low density populations of migrant locusts under were reported in Mauritania. Actions have been taken to stop the reproduction and reduce the adult population.

Overall, provisional cereal production is estimated at 20,834,000 MT for 2009/10 in West Africa, (not including Nigeria, Liberia, Sierra Leone or Mali) which is a decrease of 4% compared to last year's campaign (2008/09). While these four countries didn't present agricultural forecasts, including provisional production figures results in total cereal production across the region approaching 48 million MT. Cape Verde, Burkina Faso, Mauritania, Niger and Chad are forecast to experience a decline in production this year, ranging from 8% to 34%; while Cote d'Ivoire, Senegal, Togo, Gambia, Ghana and Benin have a production increase ranging from 1% to 45%. Countries with a deficit of production are all located in the Sahel region and it is mainly due to a late start of the raining season and sporadic dry spells causing delays in crop establishment and development.

Rice production, estimated at 8,450,000 MT, increased 6% compared to last year. Increases in rice production are expected in Benin, Burkina Faso, Gambia, Ghana, Senegal, Nigeria and Togo while decreases are expected in Mauritania, Niger and Chad.

¹ Comité pour la Lutte Contre la Sécheresse dans le Sahel (Interstate Committee for Controlling Desertification in the Sahel)

² Economic Community of West African States

³ Famine Early Warning Systems Network, a USAID activity.

⁴ Japan International Cooperation Agency

⁵ USAID Office of Foreign Disaster Assistance, based in Dakar, Senegal.

⁶ USAID West Africa Office, based in Accra, Ghana.

Maize production is estimated at 15,357,000 MT (an increase of approximately 11% as compared to 2008/09). It has increased in most countries, except in Burkina Faso, Cape Verde and Chad where production has dropped.

Total regional production estimates for other crops are 44,592,000 MT for yams, 53,815,000 MT for cassava, 2,176,000 MT for cowpea and 191,000 MT for sesame.

The overall household food situation for the immediate term is improving progressively within the region due to the supply of food on the markets after early harvests. However, the food situation remains insecure in the countries where there is a deficit in production, and there is a perpetual problem of access to food for the region's most vulnerable populations. In these regions the food security situation will worsen throughout the dry season to reach a critical point during the March-June 2010 hunger season in advance of the next rainy season.

With respect to prices, cereal prices remain higher than in 2008/09 and the average of the last five years. Despite two relatively good agricultural campaigns since the start of the food-price inflation crisis began in late 2007, prices remain well above historical averages – and most observers expect them to stay high. The local and sub-regional markets are well supplied and no major constraints have been reported on cross-border food products flows.

The tables below are intended to report CILSS, ECOWAS, and UEMOA member country agricultural estimates as well as the current year (2009/10) forecasts. This information is provided to present a general overview of relative crop developments. This data does not reflect USDA data, or official government statistics. These figures have been revised in November, and will be finalized at the end of the first quarter in 2010.

Total Cereal Production ('000 MT)

Countries	Average production of the last five years	Production 2008/09	Production 2009/10	Variation compared to 2008/2009
Niger	3,748.3	4,905.2	3,651.8	-26%
Burkina Faso	3,535.9	4,358.5	3,901.4	-10%
Mali	3,575.7	4,056.6	*	

Guinea	*	2,548	2,674.6	5%
Senegal	1,228.4	1,739.7	1,866.6	7%
Cote d'Ivoire	*	1,396	1,411.1	1%
Benin	*	1,267.6	1,834.8	45%
Togo		935.2	1,054.1	13%
Mauritania	169.3	214.8	164.1	-24%
Gambia	216.6	240.6	284.7	18%
Guinea-Bissau	194.5	200.5	207.4	3%
Chad	1,761.7	1,778.8	1,166	-34%
Ghana	*	1,813.3	2,610	44%
Nigeria	*	30,209	*	*
Liberia	*	295.2	*	*
Sierra Leone	*	*	*	*
Cape Verde	6.2	8	7.4	-8%

* Mali was not present to the meeting and Nigeria, Sierra Leone and Liberia did not present their production for 2009/10. All countries did not present the 5 yr average.